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ABSTRACT

This report provides material for assessment by State education agencies of manpower and financial contributions and the impact of these contributions on local education agencies. Part one of the assessment package offers suggestions about the possible utilization of the package materials. The second part provides assessment instruments and data formats: (1) a format for obtaining social and economic factors descriptive of school districts, with directions; (2) a professional staff questionnaire, with directions; (3) a format for obtaining federal financial information, with directions; (4) a format for obtaining State financial information, with directions; and (5) a format for obtaining local financial information, with directions. The third part uses assessment data from Wisconsin to illustrate one way in which data may be presented and analyzed. (Author/JF)

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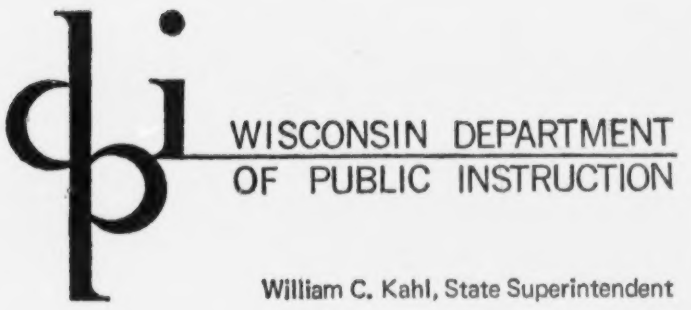

William C. Kahl, State Superintendent

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SEA - LEA PERSONNEL AND FINANCIAL RESOURCES ASSESSMENT PACKAGE

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University of Wisconsin

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University of Wisconsin

An Upper Mid-West Region Interstate Project Publication

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and
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Introduction

During 1970 the state education agencies of Illinois, Indiana, Minnesota, Ohio and Wisconsin cooperated in an Interstate Project study concerned with the amounts and characteristics of personnel and financial resources allocated by and through the five SEA's to selected urban school districts in the five states. Dr. B. Dean Bowles of the University of Wisconsin - Madison was contracted with to conduct the study and prepare a final report. The report was completed in January 1971 and distributed to the cooperating SEA's for internal analysis and use. The methodology, instruments, and analyses developed and used in the study were viewed by the participating SEA's and the U. S. Office of Education as being of potential value to all SEA's in assessing and describing personnel and financial resource allocations to local school districts. Dr. Bowles was again contracted with to revise, standardize, and consolidate the materials developed for distribution to all SEA's and the USOE. This publication is the result of that effort.

Thomas J. Stefonek, Director
Upper Mid-West Region Interstate Project

August, 1971

SEA - LEA ASSESSMENT PACKAGE

Authorized and supported in cooperation with the U. S. Office of Education under P.L. 89-10, Title V, Sec. 505 and the state education agencies of Illinois, Indiana, Ohio, Minnesota and Wisconsin.

August 1971

B. Dean Bowles, Consultant

University of Wisconsin -Madison

Additional copies of this publication are available upon request from the Interstate Project office located in the Wisconsin Department of Public Instruction, 126 Langdon Street, Madison, Wisconsin 53702.

PURPOSE

The purpose of the SEA-LEA ASSESSMENT PACKAGE is to provide assistance to state educational agencies in assessing their contributions and impact upon local educational agencies. The package of materials allows the state educational agency to assess both professional manpower and financial contributions to local educational agencies. Moreover, the materials will assess both direct and indirect impact by the state educational agency upon local educational agencies.

CONTENTS

The SEA-LEA ASSESSMENT PACKAGE is composed of three parts. The first part offers suggestions on the possible utilization of the materials. The second part provides sample instruments, data collection formats, and directions for the collection of both professional manpower and financial data. The third part illustrates one way which the data may be presented and analyzed. More specifically, the package offers the following materials:

Part I: Alternative Uses of the SEA-LEA Assessment Package (Pages 3-4)

Part II: SEA-LEA Assessment Instruments and Data Formats (Pages 5-44)

1. Format for Obtaining Social and Economic Factors Descriptive of School Districts (SED) with Directions

2. Professional Staff Questionnaire (PSQ) with Directions

3. Format for Obtaining Federal Financial Information (FFI) with Directions

4. Format for Obtaining State Financial Information (SFI) with Directions

5. Format for Obtaining Local Financial Information (LFI) with Directions

Part III: Sample Presentation of SEA-LEA Assessment Data: The Case of Wisconsin (Pages 45-67)

1. Selected Social and Economic Factors Descriptive of Urban School Districts

2. Federal, State, and Local Revenue Contributions to Urban and Non-Urban LEAs (Five Tables)

3. Professional Manpower Contributions to Urban LEAs (Seven Tables)

The SEA-LEA ASSESSMENT PACKAGE makes absolutely no claim that these materials are exhaustive of the possible uses, approaches, or analyses of the contributions and impact of state educational agencies upon local educational agencies. Indeed it would not only be desirable but also expected that a particular state educational agency conceptualize its own use of the materials, modify the materials to suit its special circumstances, and employ analyses appropriate to its peculiar information needs and policy requirements.

PART I:

ALTERNATIVE USES OF THE SEA-LEA ASSESSMENT PACKAGE

The materials and examples in the SEA-LEA ASSESSMENT PACKAGE provide for both a financial and a professional manpower assessment of state educational agency contributions and impact upon local educational agencies. An alternative use would be to utilize either the manpower or the financial materials. The scope of an assessment could even be narrowed further. A state educational agency could employ the materials by focusing on specific professional personnel problems (e.g. management development and training programs) or on a special area of the SEA's administration of programs of financial aid (e.g. Federally aided "project" programs). However, while a narrowed focus on a specific manpower problem or finance program might insure depth of analysis, failure to broaden the range of assessment guarantees some lack of perspective and comparability. Moreover, the broader the range and use of these financial and professional manpower assessment tools, the more will be their utility for policy-makers.

While the SEA-LEA ASSESSMENT PACKAGE offers a sample analysis of the financial and professional manpower contributions of a state educational agency to urban LEAs, the assessment instruments and data formats offer several other opportunities for state educational agencies to assess their contributions to local educational agencies. Several feasible, alternative possibilities are discussed below.

One alternative would be for a state educational agency to assess its contribution and impact upon local educational agencies of varying size. The assessment might well select a workable sample (perhaps five in each category) of local educational agencies with student enrollments of 0-249, 250-499, 500-999, 1000-1999, 2000-5000, and 5000+ -- or any other suitable categorical breakdown appropriate with the scheme of things in a particular state.

Another alternative would be to assess state educational agency contributions and impact upon local educational agencies of differing types. For example, rather than using student enrollment as the criterion for LEA selection, a state educational agency could distinguish among districts by such criteria as urban, suburban, rural, and rural:market-center. While there would certainly be some correlation to the enrollment suggested in the first alternative, these criteria do offer a more functional analysis than does size alone.

A third approach would be to assess the state educational agency contribution and impact on local educational agencies according to geographical region or distance of the local educational agency from the source of state educational agency services. This alternative might prove useful in geographically large states which are constantly troubled with the delivery of the services of the SEA in the more distant or remote areas of the state. The findings may also prove useful in assessing the need or utility of providing regionally or centrally based SEA services.

It would be superfluous to say that some combination of these approaches would also be in order. Likewise, it would be appropriate to aggregate all the local educational agency data for a particular type of district without specifying the particular district. However, it is strongly suggested that an assessment which neither aggregates nor samples its local educational agencies may prove both unmanageable and its findings meaningless.

The time scope of any assessment should also be well considered. While the fiscal year provides a useful and universally understood time parameter, it may not be adequate to assessing the contributions and impact of programs which lack a fiscal year boundary. For example, programs such as ESEA III operate on a "scope of work" concept; hence, many sizeable projects of a similar nature or the impact of an SEA through such a project might not be fairly assessed in given fiscal year. A two, three, or five year time scope might be more appropriate for assessments which will focus on financial or professional manpower contributions which fall within the "scope of work" concept.

The SEA-LEA ASSESSMENT PACKAGE is designed as a self-contained package. However, it could very well be the first phase of an even larger assessment. For example, the findings derived from employing the SEA-LEA ASSESSMENT PACKAGE might well lead to zeroing in on a particular financial aid program administered by the state educational agency on practices by SEA professional personnel. Moreover, a SEA-LEA assessment might suggest further examination of state educational agency operating procedures, organizational arrangements, or the rationale associated with the administration of current programs. To whatever use the SEA-LEA ASSESSMENT PACKAGE might be put, nothing should preclude the application of appropriate statistical techniques or the use of field methodology (e.g. interviewing). In the last analysis the SEA-LEA ASSESSMENT PACKAGE is intended to assist state educational agencies in fulfilling their information needs and policy requirements through self-assessment.

PART II:

SEA-LEA ASSESSMENT INSTRUMENTS AND DATA FORMATS

The SEA-LEA ASSESSMENT PACKAGE has several instruments and data formats. Each is designed to be modified, limited, or augmented to suit the assessment requirements of a particular state educational agency. For example, a state educational agency may find that its goal is the assessment of its contributions and impact on predominately rural local educational agencies, and many of the "Social and Economic Factors Descriptive of School Districts" may not prove useful or, indeed, be available. In such a case restriction of several of the social and economic variables would be in order. In another instance a state educational agency might wish to pursue the needs and requirements of a management development and training program and augment sections of the "Professional Staff Questionnaire" accordingly. And certainly each state educational agency will want to modify the "State Financial Information" section to reflect its own state aid programs. In short, elimination, modification, and augmentation should be the rule and not the exception in adapting these instruments and data formats for use in a particular state and for defined purposes.

DIRECTIONS FOR COMPLETING FORMAT FOR OBTAINING SOCIAL AND ECONOMIC FACTORS DESCRIPTIVE OF SCHOOL DISTRICTS

1. District (LEA): This item refers to the specifically selected local school districts involved in the SEA assessment. They should be listed here by their official, legal state designated name in order to avoid confusion over districts with similar names. Some SEA assessments may require less than ten districts, others may include several hundred.

2. All Other Districts: This designation refers to the total of all other local school districts in the state except those included among the specifically selected districts, i.e. "District (LEA)."

3. State Total: The State total should be the just that. That is to say, the "District (LEA)" + "All Other Districts" should equal the "State Total."

4. Population: Population refers to total population not school population. The U.S. Census is an excellent source of population information, particularly in the years immediately following a census. Another reliable and accepted authority on population is Sales Management Magazine; since it tends to be frequently up-dated, it becomes more reliable than the U.S. Census in the last half of a census decade. It is apparent here that school district population will have to be determined from municipal and county jurisdictions. In many cases the two will be co-terminous; in other cases actual census tracks must be used; and, finally, in some instances population may either have to be estimated for a school district or the assessment study must work with municipal/county population figures without regard for co-terminous boundary lines.

5. Public School Enrollment: This item should be either actual "Enrollment" or "Average Daily Membership (ADM)." It should not be "Average Daily Attendance (ADA)." If only ADA figures are available, normally the state has a conversion ratio to convert ADA to Enrollment or ADM. This conversion can be done by using a district-by-district ratio or a state-wide average. It is suggested that a district-by-district ratio be employed for each "District (LEA)" and that the state-wide ratio be used for "All Other Districts" and State Total."

6. Low Income Children: This is the number of children which the Federal government certifies to be "Low Income" for purposes of determining the allocation of ESEA Title I funds to a state. This figure should include all "Low Income Children" -- not just those in the public schools.

7. SED-2 - 5: The social and economic descriptive factors will, in many cases, require adjustments when school district and municipal boundaries are not co-terminous (similar to adjustments described in #4).

8. Statewide: SED-2, 3, 4, and 5 do not require totals as does SED-1; rather these former pages require "Statewide" averages, medians, ratios, and indexes.

9. Percent Non-White: Percent Non-White can be obtained from the U.S. Census, and an easy source of U.S. Census data is the City and County Data Book.

10. Dependency Ratio: A Dependency Ratio is an index of the number of people who generally are not a part of the work force (usually those 17-25 or younger plus those 65 and older) to the total population. It is, on the one hand, an excellent measure of the social and economic needs (e.g., education for the young and old-age assistance for the elderly) of two critical segments of the population, and, on the other hand, it is an indicator of the ability of the productive work force to provide for the social and economic needs of the more dependent population. For example, a high dependency ratio would indicate a greater demand for social services on the part of the young and/or elderly as well as a decreased capacity on the part of the productive work force to provide those services than it would be if the ratio were low.

11. Educational Attainment: The Educational Attainment figure is found in the U.S. Census or City and County Data Book in the form of median years of formal schooling for that portion of the population 25 years of age and older.

12. Average Family Income: The "Average Family Income" figure is found in the U.S. Census or the City and County Data Book in the form of an average annnual income per family unit.

13. Infant Mortality Rate: The Infant Mortality Rate is found in the Vital Statistics of the United States, a publication of the U.S. Department of Health, Education, and Welfare, Public Health Service. The Infant Mortality Rate is computed as the number of children who die within a year of birth per 1,000 live births (classified according to the place of residence of the mother).

14. Public Assistance Per Capita: Public Assistance Per Capita is found in the U.S. Census, Census of Governments: Local Government in Metropolitan Areas and Census of Governments: Compendium of Government Expenses. These figures include the total expenditures by state and local governments, including Federal intergovernmental transfers, per capita for an entire county in which a city or district is located for given fiscal year.

15. Median House Value: The Median House Value is found in the U.S. Census and the City and County Data Book in the form of a median value per single family dwelling.

16. Median Unit Rental: The Median Unit Rental is found in the U.S. Census and the City and County Data Book in the form of a median cost of renting a single family unit.

17. Percent Sound Housing: The Percent Sound Housing is found in the U.S. Census and the City and County Data Book in the form of the percent of housing units with all plumbing available.

18. Crime Rate: The Crime Rate is found in the Federal Bureau of Investigation, Uniform Crime Reports for the United States in the form of the total number of offenses (seven crimes of violence) per 100,000 inhabitants.

19. Personal Income Per Pupil: The Personal Income Per Pupil is found in the National Educational Finance Project study entitled, Personal Income by School Districts in the United States in the form of the amount of personal income (adjusted gross income) per public school pupil by state, county, and school district.

20. Percent Labor Force Unemployed: The Percent Labor Force Unemployed is found in the Manpower Reports of the President in the form a percentage of the total labor force (not total population) which is unemployed.

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF SPECIFIED SCHOOL DISTRICTS

DISTRICT (LEA)	POPULATION	PUBLIC SCHOOL ENROLLMENT	LOW INCOME CHILDREN

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF SPECIFIED SCHOOL DISTRICTS

DISTRICT (LEA)	PERCENT NON-WHITE	DEPENDENCY RATIO	EDUCATIONAL ATTAINMENT
STATEWIDE			

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF SPECIFIED SCHOOL DISTRICTS

DISTRICT (LEA)	AVERAGE FAMILY INCOME	INFANT MORTALITY RATE	PUBLIC ASSISTANCE PER CAPITA
STATEWIDE			

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF SPECIFIED SCHOOL DISTRICTS

DISTRICT (LEA)	MEDIAN HOUSE VALUE	MEDIAN UNIT RENTAL	PERCENT SOUND HOUSING (ALL PLUMBING)
STATEWIDE			

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF SPECIFIED SCHOOL DISTRICTS

DISTRICT (LEA)	CRIME RATE	PERSONAL INCOME PER PUPIL	PERCENT LABOR FORCE UNEMPLOYED

DIRECTIONS FOR DISTRIBUTING THE PROFESSIONAL STAFF QUESTIONNAIRE

1. The Professional Staff Questionnaire is best utilized when it is distributed to all SEA professional staff. Of course, it could be employed with a smaller and/or more selected distribution; however, one of the purposes of the questionnaires is to obtain data on the total professional manpower contribution which an SEA makes to school districts (LEAs) or to specific, selected school districts. Any use other than saturation of the professional staff would require "averaging" or "straight-line" projections of the findings to gain meaning, and the results would be less than adequate by these methods.

2. PSQ-1: The SEA should provide its own cover-sheet much in the form and substance of the example provided. In any event the cover-sheet should include the rationale for the study and the specific districts ("Types of Districts") to be examined in terms of services provided by the SEA.

3. PSQ-2: The answering of the "Personnel Information" can be handled in one of three ways, only two of which have proven satisfactory. First, the respondent could be asked to complete all the questions on PSQ-2. This has proven unsatisfactory because few professional staff can accurately answer Question #7 in terms of gross salary during a fiscal year, let alone have any knowledge of the source of their salary funds. The second way is to have the professional staff member complete Questions #1-6, and have the personnel, budgeting, or payroll office, as the case may be, complete Questions #7-8. The third approach is to have the personnel, budgeting, or payroll office complete all questions and then forward the remainder of the questionnaire to the respondent for completion. In any event much of the purpose of the questionnaire is defeated if Questions #7-8 are not answered or are answered incorrectly.

4. PSQ-3: No specific directions.

5. PSQ-4: No specific directions.

6. PSQ-5: No specific directions.

7. PSQ-6: No specific directions.

8. PSQ-7: Something along the lines of PSQ-7 should appear in the Professional Staff Questionnaire at this point. The Professional Staff Questionnaire should be employed to make a selected analysis of professional manpower contributions to specified types of school districts. They should be the same types of districts, indeed the same districts, that are employed in the financial and social-economic analyses in order to obtain comparability. Moreover, all the questions from PSQ-8 to PSQ-13 refer to the types of districts specified on PSQ-7.

In the example drawn from Wisconsin provided on PSQ-7 this professional staff study would be directed toward manpower contributions made by SEA professional staff to the URBAN school districts as defined and itemized. In short, where "Type of District" is indicated on PSQ-8 - 13, the word "urban" should be substituted to operationalize the questionnaire.

The respondent ought also to be made aware of the time period to which he should orient his answers. The bottom of PSQ-7 is the place to emphasize this time frame of reference. The time period used should be the same as that employed for the financial data, normally the fiscal year of July 1-June 30. If anything else is used, then adjustments must be made in the financial and salary data to gain a degree of comparability.

9. PSQ-8, 9, 10, 11, 12, & 13: No specific directions except to substitute the "Type of District" indicated on PSQ-7 in the appropriate places as provided.

PROFESSIONAL STAFF QUESTIONNAIRE

The _____(SEA)_____ is attempting to assess the extent to which its professional manpower resources are utilized in assisting _____(Types of Districts)_____ school districts in meeting educational needs and problems.

Your cooperation is necessary if this assessment is to be successful in attaining the expectations set for it by the _____(SEA)_____. Hence, it is important that you complete this questionnaire and return it as soon as possible to:

_____(Name)_____

_____(Address)_____

_____(Telephone Number)_____

In some cases this questionnaire may be followed by an interview. Consequently, it is important that you identify yourself and position as completely as possible. However, since all the results will be compiled as aggregate data, no individual will be identified by name or position in any reporting of information in this questionnaire.

However, should you have any further questions about the objectives, purposes, or procedures of this study, please contact:

_____(Name)_____

_____(Address)_____

_____(Telephone Number)_____

This assessment has been authorized by _____(Name)_____, _____(Title)_____, and your cooperation and careful attention to the completion of this questionnaire will be appreciated.

PERSONNEL INFORMATION

1. Name _____
(Surname) (First) (Middle)

2. Age _____ Date of Birth _____
(Month) (Day) (Year)

3. Title of Position _____

4. Name of Immediate Superior _____

5. Official name of the unit for which you work in the SEA. (Be sure to include the names of all divisions, offices, and unit subdivisions of which your office is a part.)

_____

_____

_____

Telephone Number: _____

6. Check the appropriate classification of your position in the SEA.

☐ Professional: Civil Service

☐ Professional: Non-Civil Service

☐ Other (Specify): _____

7. What was your GROSS salary (before taxes and deductions) for Fiscal Year(s) July 1, 197__ - June 30, 197__ ?

$_____PER (Month, Year)

8. What percent of your GROSS salary for Fiscal Year(s) July 1, 197__ - June 30, 197__ was supported by state, Federal, or other fund sources?

State Funds _____%

Federal Funds _____%

Other Funds _____%

TOTAL 100%

PROFESSIONAL EXPERIENCE

9. List below the two most recent positions held BEFORE joining your state educational agency. If you held no other position before joining the SEA, check NONE.

NONE ☐

First Position: _____
(Title)

_____
(Name of Employer)

_____ _____
(City) (State)

From _____, 197__ to _____, 197__
(Month) (Month)

Briefly describe duties and responsibilities:

Second Position: _____
(Title)

_____
(Name of Employer)

_____ _____
(City) (State)

From _____, 197__ to _____, 197__
(Month) (Month)

Briefly describe duties and responsibilities:

10. List below the two most recent positions held in your SEA prior to your current positions. If you have had no other positions in the SEA, check NONE.

NONE ☐

First Position: _____
(Title)

_____
(Name of Immediate Superior)

_____
(Name of Division, Office, Unit)

From _____ (Month), 197__ to _____ (Month), 197__

Briefly describe duties and responsibilities:

Second Position: _____
(Title)

_____
(Name of Immediate Supervisor)

_____
(Name of Division, Office, Unit)

From _____ (Month), 197__ to _____ (Month), 197__

Briefly describe duties and responsibilities:

EDUCATION AND TRAINING

11. List below the higher education degrees you now hold. If you hold no higher education degree, check NONE.

NONE ☐

B.A./B.S. _____ Date Granted _____, 19 _____
(Month)

Institution _____
(Name)

Major Field(s) _____

Minor Field(s) _____

M.A./M.S. _____ Date Granted _____, 19 _____
(Month)

Institution _____
(Name)

Major Field(s) _____

Minor Field(s) _____

Ed.D./Ph.D._____ Date Granted_____, 19_____
(Month)

Institution _____
(Name)

Major Field(s) _____

Minor Field(s) _____

ADDITIONAL REMARKS:

12. List below the most recent FORMAL educational experience you have had. If the most recent formal educational experience you have had is associated with completion of degree work noted in #11 (above), check DEGREE ASSOCIATED and go on to item #13.

DEGREE ASSOCIATED ☐

Most recent formal educational experience:

Describe: _____

_____

Date of Completion: _____, 19__
(Month)

Next most recent formal educational experience:

Describe: _____

_____

Date of Completion: _____, 19__
(Month)

13. List below the most recent TRAINING experiences which were not a part of formal educational experience at an institution of higher education. These would include agency sponsored workshops, non-credit, job-related courses of study, but not formal education with credit or "on-the-job" training. If you have had no training experiences of this type, check NONE.

NONE ☐

Most recent training experience:

Describe: _____

_____

Sponsor of Training: _____
(Name of Agency)

Date of Completion: _____, 19__
(Month)

Next most recent training experience:

Describe: _____

_____

Sponsor of Training: _____
(Name of Agency)

Date of Completion: _____, 19__
(Month)

TYPES OF DISTRICTS

To this point the "Professional Staff Questionnaire" has asked for "Personnel," "Professional Experience," and "Education and Training" information. From this point on to the completion of the questionnaire your responses should be in terms of the specified, selected, or type of district which is given central focus in this study.

This "Professional Staff Questionnaire" will focus on URBAN school districts in the state. URBAN school districts are defined as those districts which (1) are within a Standard Metropolitan Statistical Area (SMSA) of 50,000+ total population; (2) have 5% or more of the public school enrollment of "low income" children as defined for ESEA Title I purposes; and (3) have at least 1,000 low income children. For purposes of this study the following school districts are URBAN school districts in Wisconsin.

Green Bay

Kenosha

La Crosse

Madison

Milwaukee

Racine

Hence, whenever on PSQ-8 - 13 URBAN districts are referred to, it means the above six school districts; and whenever, ALL OTHER DISTRICTS are referred to, it means all others except the six listed above.

TIME SCOPE OF STUDY

In considering your responses of the questions on PSQ-8 - 13, you should reflect only on that period from:

_____ _____, 197__ to _____ _____, 197__
(Month) (Day) (Month) (Day)

SOURCES OF INFORMATION

14. You have had access to a wide range of information which would be relevant to the PERFORMANCE OF YOUR JOB. Which of the sources of information listed below have been most useful to your providing services to (Types of Districts) school districts.

Rank order the five (5) most useful sources of information by designating the most useful "1," the next most useful "2," and so on. Do not rank order all of them, only the five (5) most useful.

SOURCE OF INFORMATION	RANK ORDER
Personal Observation and Experience	_____
Conferences with LEA Personnel	_____
LEA Reports to the SEA	_____
SEA Reports Relative to the LEAs	_____
Federal Reports Relative to the LEAs	_____
Newspaper Accounts of the Needs of LEAs	_____
Conferences with SEA Personnel	_____
Professional Journals and Periodicals	_____
SEA Training Programs	_____
Reports Emanating from Other State Agencies (Including the Governor's Office and Legislature)	_____
Television	_____
University Educational and Training Programs	_____
Books, Popular Magazines	_____
Other: _____	_____

15. Describe two opportunities you have had during the past year to obtain special briefings or first-hand information on (Types of Districts) school districts and their special problems and/or needs. If none, check NONE.

NONE ☐

Opportunity No. 1: _____

_____

_____

_____

Opportunity No. 2: _____

_____

_____

_____

16. Describe two opportunities you have had in past employment, community service, or volunteer work to gain first-hand knowledge or otherwise learn of the special problems and/or needs of (Types of Districts) school districts. If none, check NONE.

NONE ☐

Opportunity No. 1: _____

_____

_____

_____

Opportunity No. 2: _____

_____

_____

_____

RELATIONSHIPS WITH LEAs

17. In the performance of your job during the past year which of the following have tended to INITIATE ACTION regarding programs, services, etc. relative to __(Types of Districts)__ school districts.

Rank order the five (5) greatest initiators of your action as an SEA professional by designating the most frequent initiator "1," the next most frequent initiator "2," and so on. Do not rank order all of them, only the five most frequent initiators.

SOURCE OF INITIATION	RANK ORDER
Local School District (LEA)	_____
Federal Government	_____
Citizen(s)	_____
State Educational Agency: From a Superior	_____
State Educational Agency: Self-Initiated	_____
State Educational Agency: Standard Operating Procedure/ Established Policy	_____
Other State Agencies (Including the Governor's Office and Legislature)	_____
Organized Professional Education Association or Interest Group	_____
Other Organized Association or Interest Group	_____
Other: _____	_____

18. In the performance of your job would you estimate the AMOUNT OF TIME you devoted during the past year to each of the specified school districts and to other more general SEA responsibilities.

In order to assign an amount of time to a specific district, one need not have visited the district; he could have rendered service beneficial to the district at the SEA or elsewhere. In short, one would need only to distinguish service rendered to a specific district (LEA) from service rendered the SEA generally -- even though many districts would undoubtedly benefit from such SEA service.

For purposes of estimating AMOUNT OF TIME consider 240 workdays as equivalent to a year. Hence, if you estimate the amount of time spent with District "X" to be 24 full-day-equivalents, then the percentage would be 10% (.10). Likewise, 12 full-day-equivalents would be 5% (.05), 6 full-day-equivalents 2½% (.025), and so forth. The total accounted for should be 240 days and 100% total time.

DISTRICT (LEA)	TOTAL ANNUAL FULL-DAY-EQUIVALENTS (240 Days = 1 Year)	PERCENTAGE
ALL OTHER DISTRICTS (LEAs) IN THE STATE		
ALL OTHER SEA JOB RESPONSIBILITIES		
TOTAL	240	100%

TYPES OF DISTRICTS

19. In terms of the AMOUNT OF TIME (Question #18) you devote to (Types of Districts) school districts and to SEA job responsibilities, how much of that time is spent in the following types of activities?

TYPES OF ACTIVITIES	PERCENTAGE OF TIME SCHOOL DISTRICTS (LEAs)	PERCENTAGE OF TIME SEA JOB RESPONSIBILITIES
Review, Evaluation & Revision	_____	_____
Enforcement	_____	_____
Development & Dissemination	_____	_____
Fiscal Management	_____	_____
Inter-Agency, Office Coordination	_____	_____
Report Writing & Data Gathering	_____	_____
Supervision (of SEA Personnel)	_____	_____
Consultation (Providing Expertise)	_____	_____
General, Miscellaneous Administrative Tasks	_____	_____
Travel	_____	_____
Other: _____	_____	_____
TOTAL	100%	100%

20. Is there any difference in the types of activities you perform in connection with (Types of Districts) school districts and "All Other Districts?" Comment.

Yes ☐ No ☐

_____

_____

_____

_____

21. In the performance of your job you have employed various means of COMMUNICATION with (Types of Districts) school districts.

Rank order the five (5) most frequently used means of COMMUNICATION with (Types of Districts) school districts by designating the most frequent means of communication "1," the next most frequent means of communication "2," and so on. Do not rank order all of them, only the five (5) most frequently used means of communication.

MEANS OF COMMUNICATION	RANK ORDER
Face-to-Face with an Individual at an LEA	_____
Face-to-Face with an Individual at the SEA	_____
Face-to-Face in Groups at an LEA	_____
Face-to-Face in Groups at the SEA	_____
Written Correspondence	_____
Telephone	_____
Professional Meetings, Conventions, and Conferences	_____
Other: _____	_____

22. Is there any difference in the means of communication you employ in connection with (Types of Districts) school districts and "All Other Districts?" Comment.

Yes ☐ No ☐

_____

_____

_____

_____

DIRECTIONS FOR COMPLETING FORMAT FOR OBTAINING FEDERAL FINANCIAL INFORMATION

1. Fiscal Year(s): Assure yourself that the financial information provided conforms to the fiscal year or years involved in the SEA assessment.

2. District (LEA): This item refers to the specifically selected local school districts involved in the SEA assessment. They should be listed here by their official, legal state designated name in order to avoid confusion over districts with similar names. Some SEA assessments may require less than ten districts, others may include several hundred.

3. ESEA I, ESEA II ....: These are the major items which should be included in a SEA assessment of Federal financial assistance to local school districts and the SEA. Earlier studies and piloting of these instruments indicated that NDEA V is not useful in a SEA assessment. Similarly PL 815 and PL 874 funds are not usually included because they are treated differently in the several states. Finally ESEA V monies are suggested for exclusion because they no longer have "flo-thru" provisions. In summary, the format does not provide for inclusion of ESEA V, NDEA V, and PL 815/874 funds, not even in the category "All Other Federal Aid." Of course, SEAs could make additional categories or delete some of those present in order to have a more suitable instrument for unique assessment objectives. A footnote or two should be provided to indicate what items are included in the category "All Other Federal Aid."

4. All Other Districts: This designation refers to the total of all other local school districts in the state except those included among the specifically selected districts, i.e. "District (LEA)."

5. Retained by SEA: Federal funds retained by the SEA fall conveniently into two categories. The first category are those funds retained by the SEA for the "Administration" of the program in question and will not "flo-thru" to a local school district. The second category are those funds retained by the SEA which have not as yet been distributed to LEAs on a project basis or which will be utilized by the SEA in the operation of its own project. Examples of the latter two instances include ESEA III funds which are designated for local districts but which have not been distributed. In this instance these funds would be recorded under "Retained by SEA -- Projects." An example of an SEA operating its own project might be its use of EPDA/B-2 funds for training special education teachers. These funds too would be recorded under "Retained by SEA -- Projects."

6. Other Jurisdictions: Frequently federal funds will "flo-thru" and find their way into other levels of government, another state agency, or unique operating units providing educational services. Examples of other jurisdictions might include a county superintendent of schools office, an intermediate coordinating

or regional office within a state, another state agency such as the Office of the Attorney General, or state schools for the blind, deaf, or mentally retarded. Another way to define what should be included in this category is to indicate what should not be included, namely funds to any local school district (LEA) or funds retained by the SEA as defined in number 5.

7. State Total: The state total should be the entire Federal sum which comes to a state in the fiscal year(s) under consideration. In short, the state total should equal the sum of "Districts (LEA)" + "All Other Districts" + "Retained by SEA" + "Other Jurisdictions." Or, in other words, these four items should account for all funds received from the Federal government by the state for each categorical program.

FORMAT FOR OBTAINING FEDERAL FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)		ESEA I	ESEA II	ESEA III
ALL OTHER DISTRICTS				
RETAINED BY SEA	ADMINISTRATION			
	PROJECTS			
OTHER JURISDICTIONS				
STATE TOTAL				

FORMAT FOR OBTAINING FEDERAL FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DICTRICT (LEA)		ESEA VI	FEDERAL VOCATIONAL AID	FEDERAL FOOD PROGRAM AID
ALL OTHER DISTRICTS				
RETAINED BY SEA	ADMINISTRATION			
	PROJECTS			
OTHER JURISDICTIONS				
STATE TOTAL				

FORMAT FOR OBTAINING FEDERAL FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	NDEA III	ALL OTHER FEDERAL AID	TOTAL FEDERAL AID
ALL OTHER DISTRICTS			
RETAINED BY SEA	ADMINISTRATION		
	PROJECTS		
OTHER JURISDICTIONS			
STATE TOTAL			

DIRECTIONS FOR COMPLETING
FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

1. Fiscal Year(s): Assure yourself that the financial information provided conforms to the fiscal year or years involved in the SEA assessment.

2. District (LEA): This items refers to the specifically selected local school districts involved in the SEA assessment. They should be listed here by their official, legal state designated name in order to avoid confusion over districts with similar names. Some SEA assessments may require less than ten districts, others may include several hundred.

3. All Other Districts: This designation refers to the total of all other local school districts in the state except those included among the specifically selected districts, i.e. "District (LEA)."

4. Other Jurisdictions: Examples of other jurisdictions might include a county superintendent of schools office, an intermediate coordinating or regional office within a state, another state agency such as the Office of the Attorney General, or state schools for the blind, deaf, or mentally retarded. Another way to define what should be included in this category is to indicate what should not be included, namely funds to any local school district (LEA).

5. State Total: "District (LEA) plus "All Other Districts" plus "Other Jurisdictions" should total and equal "State Total".

6. General Support Program: This item refers to funds which would normally come through application of the state aid formula or foundation program. Frequently the formula might include variables which would normally be more suitable for another category of state aid. The ease of separating the funds would dictate whether an SEA would include such funds under this category or break them out into more appropriate categories of state financial aid.

7. Transportation: This would include state funds allocated for operating expenses as well as funds for the lease or purchase of buses or other capital equipment related to transportation.

8. Driver Training/Education: This category would comprise funds for both "in-class" and "behind the wheel" instruction and any capital equipment funds earmarked for driver training/instruction.

9. Special Education: This category refers to state aid allocated for operating special education programs and for any capital expenditures earmarked for special education. In some states there might be considerable difficulty in distinquishing between social-psychological services (next SFI category) which the state aids generally and similar services more narrowly associated with special education. The SEA must decide into which of the two program categories state aid falls. Appropriately a footnote would be made as to the decision on the assignment of funds.

10. Social-Psychological Services: This category is most appropriate for state aided programs of counseling, guidance, psychometric and psychological services, and school related social work. When such services are closely associated with special education, the SEA must assign the funds to either this or the special education category.

11. Vocational-Technical: This category refers to state financial assistance for vocational, technical, work-study, home economics, consumer education, industrial arts or similar programs although they may fall outside a narrower definition of that which constitutes vocational-technical in some states.

12. Textbooks/Library: This category refers to state aid programs for the purchase of textbooks, library books, IMC, or general learning materials. Some states have programs for the "state purchase" of textbooks for local districts; hence, these funds never find their way into local district budgets. Nevertheless, the amount of state purchase for a local school district should be credited as financial assistance to the district.

13. Retirement-Social Security: State contributions to either state retirement systems or social security should be credited to the local district. In some states these funds are managed by and through the SEA; in other states they will appear on the budget of the SEA; in still other states the SEA is totally disassociated from virtually any knowledge of the retirement/social security system. In those states where retirement/social security funds appear as an item in the SEA budget they should be duly credited to the local district.

14. Building Aid: Those funds granted by the state through the budget of the SEA to local districts for purposes of assisting districts in their school building and maintenance program should be included in this category. Care should be taken to record for districts only those funds which are free of the obligation of repayment by the district. Hence, grants-in-aid and state payments on the principal or interest of bonds involved in a state school building aid program should be recorded under the district receiving the benefit. However, funds granted to a district on a loan or self-amortization basis should not be so recorded, but should remain as an operating expenditure of the SEA.

15. Contributions in Lieu of Taxes: Any contribution in lieu of taxes made by the state through the SEA should be recorded in this category. A contribution in lieu of taxes may appear in some states as a payment to local districts for mobile homes registered but not taxed locally. In other states an in lieu of tax payment may come in the form of pro-rata distribution of a state-wide tax on utilities. In any case instances such as these should be noted here.

16. Other State Aid: Other forms of state aid through the SEA should be recorded here with a footnote explaining any significant contributions or special programs important to the SEA.

17. Total State Aid: This category should properly account for all state aid to a particular, specified district in the SEA-LEA assessment, and the grand total should reflect the total state aid to all governmental jurisdictions. In other words the difference between the total SEA budget and the total state aid should be the operating budget of the SEA (state dollars only).

FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	GENERAL SUPPORT PROGRAM	TRANSPORTATION	DRIVER TRAINING EDUCATION
ALL OTHER DISTRICTS			
OTHER JURISDICTIONS			
STATE TOTAL			

FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	SPECIAL EDUCATION	SOCIAL PSYCHOLOGICAL SERVICES	FOOD SERVICES
ALL OTHER DISTRICTS			
OTHER JURISDICTIONS			
STATE TOTAL			

FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	VOCATIONAL/ TECHNICAL EDUCATION	TEXTBOOKS & LIBRARY	RETIREMENT & SOCIAL SECURITY
ALL OTHER DISTRICTS			
OTHER JURISDICTIONS			
STATE TOTAL			

FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	STATE SCHOOL BUILDING AID	STATE CONTRIBUTIONS IN LIEU OF TAXES

FORMAT FOR OBTAINING
STATE FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	ALL OTHER STATE AID	TOTAL STATE AID
ALL OTHER DISTRICTS		
OTHER JURISDICTIONS		
STATE TOTAL		

DIRECTIONS FOR COMPLETING FORMAT FOR OBTAINING LOCAL FINANCIAL INFORMATION

1. Fiscal Year(s): Assure yourself that the financial information provided conforms to the fiscal year or years involved in the SEA assessment.

2. District (LEA): This item refers to the specifically selected local school districts involved in the SEA assessment. They should be listed here by their official, legal state designated name in order to avoid confusion over districts with similar names. Some SEA assessments may require less than ten districts, others may include several hundred.

3. Total All Other Districts: This designation refers to the total of all local school districts in the state except those included among the specifically selected districts, i.e. "District (LEA)." In the case of columns entitled "Total Local School District Expenditures," "Total Local School District Revenue from Local Tax Levy," and "Equalized Property Valuation: Total" the entry should be a sum total. In the case of columns entitled "Equalized Property Valuation: Per Pupil" and "Full Value Property Tax Rates" the entries should be in the form of ratios, medians, or means as the case may dictate.

4. State Total: The State Total should be the sum of "District (LEA)" + "Total All Other Districts." Again, as in the case of "Total All Other Districts," the columns entitled "Equalized Property Valuation: Per Pupil" and "Full Value Property Tax Rates," the entries should be in the form of ratios, medians, or means as the case may dictate.

5. Total Local School District Expenditures: This figure should reflect the total expenditures of the district literally, including debt service, transportation, recreation and other items which may find their way into separate accounts in some states. These funds should also include all expenditures regardless of the revenue source; hence, expenditures whether or not they can be traced to Federal, state, local, or "other" sources of income should be included.

6. Total Local School District Revenue from Local Tax Levy: This item calls for the total levy raised by applying the school tax rate against the property valuation; it is not the tax or mill rate. In other words the amount to be entered here is that amount raised through the local property tax levy and does not include revenue derived from Federal, state, or "other" sources.

7. Equalized Property Valuation: The Equalized Property Valuation is the property valuation established by a state or county agency which reflects and adjusts for differences in local assessment practices. Normally the agency applies an equalizing ratio to the local assessment to bring the "equalized" assessment up to or down to a state or county "average" or "real" valuation. "Total"

requires that the total dollar amount (not the ratio) be furnished. To determine the "Per Pupil" equalized property valuation the "Total" equalized property valuation should be divided by the pupil enrollment or other pupil factor which the state may employ to determine "Equalized Property Valuation/ Pupil." If the "Pupil" figure used to determine the "Per Pupil" valuation is different from the "Enrollment" or ADM figure supplied on the "Format for Obtaining Social and Economic Factors Descriptive of School Districts", enter the new figure here and note its derivation.

8. Full Value Property Tax Rates: Full Value Property Tax Rates are the tax rates necessary to raise a given amount of revenue if property were assessed at 100% of its real or full value. School districts, municipalities, and counties may base their tax rates on a percentage of valuation less than 100%; if that is the case, then the figure entered here should reflect what the tax rate would be if the rate were based on 100% valuation. However, if "Full Value Property Tax Rates" cannot be determined at the SEA, then the "Equalized Tax Rate" should be used and noted. In any event a distinction should be made between the tax rate for "School Purposes" (indicate which levels are covered if other than K-12) and that for "All Purposes." The "All Purposes" rate should include the school tax rate however.

FORMAT FOR OBTAINING
LOCAL FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	TOTAL LOCAL SCHOOL DISTRICT EXPENDITURES	TOTAL LOCAL SCHOOL DISTRICT REVENUE FROM LOCAL TAX LEVY
TOTAL ALL OTHER DISTRICTS		
STATE TOTAL		

FORMAT FOR OBTAINING
LOCAL FINANCIAL INFORMATION

FISCAL YEAR (FY) 197 - 197

DISTRICT (LEA)	EQUALIZED PROPERTY VALUATION		FULL VALUE PROPERTY TAX RATES	
	TOTAL	PER PUPIL	SCHOOLS	ALL PURPOSES
TOTAL ALL OTHER DISTRICTS				
STATE TOTAL				

PART III:

SAMPLE PRESENTATION OF SEA-LEA ASSESSMENT DATA:

THE CASE OF WISCONSIN

The objective of this sample presentation is to illustrate some real data which grew out of a real SEA-LEA assessment. More specifically, the sample presentation of SEA-LEA assessment data is designed to illustrate a way some data can be descriptively displayed following use of the SEA-LEA ASSESSMENT PACKAGE in one state! Wisconsin. No attempt is made in this presentation to be complete; indeed, much of the data has been omitted in an effort to achieve some brevity for inclusion in this package. Moreover, no pretense is made to state findings, formulate conclusions, or make recommendations. An effort will be made only to underscore the more salient elements in the data.

The Wisconsin SEA-LEA assessment was undertaken to determine the financial and professional manpower contributions made by the state educational agency to urban local educational agencies within the state. Several decisions contributed to defining the parameters of the assessment and making it manageable. First, financial contributions were defined as any which found their way through the state educational agency budget whether they were hard state funds or Federal "flo-thru." Second, the non-urban district data would be aggregate and not a sample of non-urban districts. Third, the urban districts were defined in terms of population and number and percentage of low income children in the school district. Fourth, the various assessment instruments and data formats were duplicated and distributed to the appropriate offices in the SEA for completion and return. The "Professional Staff Questionnaire" was distributed to all state educational agency professional employees for completion and return; hence, the assessment sought saturation of the professional staff rather than a sampling. Some selected interviewing was done to determine the organization and operating procedures for servicing urban school districts in the state as well as for ascertaining the policies, rationale, and procedures for administering programs which were thought to have a special significance and impact on urban local educational agencies.

Table I illustrates the social and economic factors which are descriptive of the urban school districts, the aggregate of non-urban school districts and the state as a whole. Salient features of Table I include the following observations:

1. About two-thirds of the low income children do not live in urban districts in the state.

2. With the exception of Milwaukee and LaCrosse the non-urban school districts and the state as a whole has a greater number of low income children than do the urban school districts.

3. With the exception of Milwaukee and Racine the question of low income children concerns low income white children rather than low income non-white children.

4. Madison stands out as an urban district distinct in the state from the other urban districts in terms of Dependency Ratio, Educational Attainment, and Infant Mortality Rate.

5. The question of inadequate housing is more a non-urban factor than an urban factor.

6. That the factors of Family Income, Personal Income Per Pupil, and Public Assistance Per Capita reveal less of an urban than a non-urban problem.

The character of urban districts in Wisconsin, particularly in terms of the greater distribution of low income children in non-urban districts, while not unique to Wisconsin, does deviate from the pattern of social and economic factors of urban and non-urban districts in most other states. These observations concerning the social and economic characteristics of the urban and non-urban districts in Wisconsin can contribute much to the conclusions and recommendations which emanate from an SEA-LEA assessment.

An examination of Table II can reveal certain differences among the urban districts in their benefit from federal aid, at least as determined on an enrolled pupil basis. Moreover, there is considerable difference in the benefit gained by non-urban districts when compared to urban districts and particularly some selected urban districts. The only Federal program which is designed for low income children is ESEA I. In Wisconsin the ESEA I funds are equally distributed to urban school districts on a per low income pupil basis; however, non-urban districts appear to benefit more by approximately $10 per low income pupil than do urban districts.

Such salient features might very well stimulate further inquiry into the data, the specific programs which account for the differences, and the program administration. For example, investigation might very well reveal that certain Federal programs which have matching provisions cannot be accommodated by the poorer school districts. Other programs may require project proposals, and interviews may reveal that the LEAs which have least benefited have also been those who have not pursued an aggressive grantsmanship policy. In either case there may be found the substance of recommended change in state statutory provisions, SEA administrative policies or practices, or in Federal guidelines.

Table III illustrates the state aid received by urban and non-urban districts program and by enrolled pupil. The same analysis of differences in state aid to urban and non-urban districts can be made here as in the instance of the Federal programs. Additional criterion variables can be introduced too. For example, if one applies the criterion of low income pupil to the state general support program, one finds that because state general support is not distributed with low income children as a variable, the use of low income children grossly distorts the data. That is a fair assertion.

However, unless new variables are introduced into the examination of current programs, those programs cannot be examined in light of the new needs or requirements as expressed in those variables. Now in the Wisconsin assessment since low income children was introduced into the definition of urban, it seemed appropriate that it also be utilized as a criterion measure of some of the programs. In such instances the SEA-LEA assessment might suggest alterations which could be made in the state general support program to the legislature or in the administrative guidelines which affect other sources of state aid.

Analyses similar to those described for Tables II and III can be made for Tables IV and V.

Tables VI-XII are the product of the "Professional Staff Questionnaire." Table VI is a summary of the saturation survey and is an illustration of the professional manpower contribution (in dollars) to urban school districts. One salient feature which can be drawn from comparing Tables VII-IX is that SEA professionals have little background in urban school districts, spend most of their effort in formal education which they find has little value as they relate to urban districts. Such an observation should have considerable implication for the development SEA-sponsored management development programs particularly as they relate to task areas -- such as urban education. Finally Tables X-XII illustrate data relevant to how SEA professionals relate to urban school districts in terms of communication, initiation, and types of activities.

TABLE I

WISCONSIN

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF URBAN SCHOOL DISTRICTS*

DISTRICT (LEA)	POPULATION**	PUBLIC SCHOOL ENROLLMENT***	LOW INCOME CHILDREN***	PERCENT LOW INCOME CHILDREN
Green Bay	83,300	22,144	1,284	5.79
Kenosha	77,300	22,150	1,300	5.86
LaCrosse	53,200	9,947	1,082	10.88
Madison	168,100	33,368	2,231	6.68
Milwaukee	763,500	126,764	17,301	13.64
Racine	100,000	32,021	1,949	6.08
TOTAL ALL URBAN DISTRICTS (LEAs)	1,245,400	246,394	25,147	10.21
TOTAL ALL OTHER DISTRICTS (LEAs)	2,706,377	672,650	57,789	8.59
STATE TOTAL	3,951,777	919,044	82,936	9.02

* Four other school districts exceeded 50,000 in total population (Appleton 55,800, Oshkosh 52,900, Wauwatosa 61,100, and West Allis 77,800). However, all fell below the additional criteria for an urban district by having less than 1,000 low income children (Appleton 501, Oshkosh 545, Wauwatosa 436, and West Allis 402) and less than 5% of low income children to total public school enrollment (Appleton 3.88%, Oshkosh 4.94%, Wauwatosa 3.95%, and West Allis 2.89%).

** Sales Management Magazine, 1969, reflects population figures as of December 31, 1968.

*** State of Wisconsin, Department of Public Instruction

TABLE I (CONTD.)

WISCONSIN

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF URBAN SCHOOL DISTRICTS

DISTRICT (LEA)	AVERAGE FAMILY INCOME*	PERCENT NON-WHITE**	DEPENDENCY RATIO***	EDUCATIONAL ATTAINMENT****
Green Bay	$5,981	0.9	47.8	11.2
Kenosha	7,035	1.5	45.1	10.3
LaCrosse	5,865	0.3	45.4	11.5
Madison	6,799	1.9	39.0	12.5
Milwaukee	6,664	8.9	47.7	10.4
Racine	6,758	5.4	46.0	10.5
STATEWIDE	$5,926	2.4	N/A	10.4

* U.S. Bureau of the Census, City and County Data Book, 1967, Tables 201, 239, 240, and 231.

** U.S. Bureau of the Census, City and County Data Book, 1967, Table 206.

*** The Dependency Ratio was computed by adding the percentage of the total population ages 17 and younger to the percentage of the population 65 and older using data taken from City and County Data Book, 1967, Tables 213, 214.

**** Educational Attainment is the average years of formal schooling completed by those 25 years and older at the time of the 1960 census and is taken from City and County Data Book, 1967, Table 200.

TABLE I (CONTD.)

WISCONSIN

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF URBAN SCHOOL DISTRICTS

DISTRICT (LEA)	INFANT MORTALITY RATE*	PUBLIC ASSISTANCE PER CAPITA**	MEDIAN HOUSE VALUE***	MEDIAN UNIT RENTAL***
Green Bay	28.0	$12.69	$11,800	$71
Kenosha	19.4	33.98	13,300	76
LaCrosse	21.5	N/A	11,300	67
Madison	13.4	27.36	15,900	92
Milwaukee	24.3	27.51	15,100	87
Racine	21.8	19.81	13,800	81
STATEWIDE	19.4	$40.81	$12,600	$79

* Infant Mortality Rate is the number of children who die within one year of birth per 1,000 live births, classified according to the place of residence of the mother. Source: U.S. Department of Health, Education, and Welfare, Public Health Service, Vital Statistics of the United States, 1967, Tables 2-1 and 7-1.

** Public Assistance Per Capita is the total expended to individuals in FY 1967 for welfare by both the state and local governments. Both may be expending Federal intergovernmental transfers as well, which are included in these data. Data include the entire county in which the city is located. Source: U.S. Bureau of the Census, Census of Governments, 1967; Volume 5, Local Government in Metropolitan Areas, Table 12. Source of the state total was: Census of Governments, 1967: Volume 4, No. 5, Compendium of Government Expense, Table 36.

*** U.S. Bureau of the Census, City and County Data Book, 1967, Tables 201, 239, 240, and 231.

TABLE I (CONTD.)

WISCONSIN

SELECTED SOCIAL AND ECONOMIC FACTORS
DESCRIPTIVE OF URBAN SCHOOL DISTRICTS

DISTRICT (LEA)	PERCENT SOUND HOUSING (ALL PLUMBING)*	PERSONAL INCOME PER PUPIL**	PERCENT LABOR FORCE UNEMPLOYED***	CRIME RATE****
Green Bay	81.2	$10,365	N/A	546.4
Kenosha	84.3	10,684	4.6	1,098.2
LaCrosse	75.9	13,677	N/A	N/A
Madison	84.2	14,046	2.2	844.9
Milwaukee	82.5	13,059	2.7	1,010.2
Racine	86.3	11,479	2.9	1,188.4
STATEWIDE	75.0	$10,213	3.4	737.6

* U.S. Bureau of the Census, City and County Data Book, 1967, Table 236.

** Personal Income Per Pupil is found in the National Educational Finance Project study entitled, Personal Income by School Districts in the United States (1971) in the form of the amount of personal income (adjusted gross income) per public school pupil by state, county, and school district.

*** The Percent Labor Force Unemployed is the average for the first eleven months of 1969. Source: Manpower Report of the President (1970).

**** Crime Rate is the number of total offenses (seven crimes of violence) per 100,000 inhabitants in the SMSA. Source: Federal Bureau of Investigation, Uniform Crime Reports for the United States (1965).

TABLE II

WISCONSIN

FEDERAL REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	ESEA I	ESEA II	ESEA III	FEDERAL VOCATIONAL AID
Green Bay	$ 208,269	$ 17,274	$ 36,345	$ 28,255
Kenosha	212,089	16,268	149,592	11,987
LaCrosse	173,208	6,250	-------	-------
Madison	362,055	23,060	207,062	121,063
Milwaukee	2,796,607	87,353	355,296	181,419
Racine	312,457	24,945	198,904	18,177
TOTAL TO ALL URBAN DISTRICTS	$ 4,064,685	$ 175,150	$ 947,199	$ 360,901
TOTAL ALL OTHER DISTRICTS (LEAs)	$9,907,427	$ 922,969	$1,311,709	$1,432,150
RETAINED BY SEA FOR ADMINISTRATION AND PROJECTS	$ 242,525	$ 137,460	$ 237,500	$ 119,508
STATE TOTAL	$14,214,637	$1,235,579	$2,496,408	$1,912,559

TABLE II (CONTD.)

WISCONSIN

FEDERAL REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	FEDERAL FOOD AID PROGRAMS	NDEA III/V	ALL OTHER FEDERAL AID***	TOTAL FEDERAL AID
Green Bay	$ 67,310	$ 52,365	$ 10,865	$ 420,683
Kenosha	49,516	45,050	--------	484,502
LaCrosse	66,502	3,077	10,690	259,727
Madison	155,261	63,959	15,914	948,374
Milwaukee	489,738	271,198	12,517	4,194,128
Racine	89,842	48,908	6,781	700,014
TOTAL TO ALL URBAN DISTRICTS	$ 918,169	$ 484,557	56,767	$ 7,007,428
TOTAL ALL OTHER DISTRICTS (LEAs)*	$4,828,061	$1,552,631	622,442	$20,577,389
RETAINED BY SEA FOR ADMINISTRATION AND PROJECTS**	$ 3,835	$ 82,365	654,433	$ 1,477,626
STATE TOTAL	$5,750,065	$2,119,552	$1,333,642	$29,062,443

* This category includes intermediate units as well (Cooperative Educational Service Agency).

** This category includes both funds retained for administration and for projects.

*** "All Other Federal Aid" includes ESEA V, VI, EPDA/B-2, but it does not include PL 815/874 funds.

TABLE II (CONTD.)

WISCONSIN

FEDERAL REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	FEDERAL CONTRIBUTION PER ENROLLED PUPIL	ESEA I CONTRIBUTION PER ENROLLED	ESEA I CONTRIBUTION PER LOW INCOME
Green Bay	$19	$ 9	$162
Kenosha	22	10	163
LaCrosse	26	17	160
Madison	28	11	162
Milwaukee	33	22	162
Racine	22	10	160
TOTAL TO ALL URBAN DISTRICTS	$29	$16	$161
TOTAL ALL OTHER DISTRICTS (LEAs)	$36	$15	$171
RETAINED BY SEA FOR ADMINISTRATION AND PROJECTS	---	---	---
STATE TOTAL	$32	$15	$171

Sample-FFI

TABLE III

WISCONSIN

STATE REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	GENERAL SUPPORT PROGRAM	TRANSPORTATION	DRIVER TRAINING EDUCATION	SPECIAL EDUCATION
Green Bay	$ 2,146,200	$ 146,822	$ 27,825	$ 415,444
Kenosha	2,783,773	89,448	------	344,030
LaCrosse	467,940	72,012	8,750	165,065
Madison	1,594,959	77,106	44,950	574,806
Milwaukee	8,113,518	174,288	128,310	2,173,448
Racine	5,020,409	252,432	------	463,186
TOTAL TO ALL URBAN DISTRICTS	$ 20,126,799	$ 812,108	$ 209,835	$ 4,135,979
TOTAL ALL OTHER DISTRICTS (LEAs)*	$132,280,745	$10,904,023	$1,090,508	$ 6,814,405
STATE TOTAL	$152,407,544	$11,716,131	$1,300,343	$10,950,384

TABLE III (CONTD.)

WISCONSIN

STATE REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	SOCIAL PSYCHOLOGICAL SERVICES	TEXTBOOKS & LIBRARY	RETIREMENT & SOCIAL SECURITY **	ALL OTHER STATE AID
Green Bay	$ 13,621	$ 23,502	$ 898,261	$ 53,338
Kenosha	27,913	20,489	903,945	49,919
LaCrosse	21,763	11,724	383,476	39,817
Madison	138,197	30,613	1,462,918	74,611
Milwaukee	596,003	134,754	6,462,635	462,144
Racine	26,153	27,732	1,257,384	83,959
TOTAL TO ALL URBAN DISTRICTS	$ 823,650	$248,814	$11,368,619	$ 763,788
TOTAL ALL OTHER DISTRICTS (LEAs)	$ 806,608	$688,008	$30,714,389	$1,445,104
STATE TOTAL	$1,630,258	$936,822	$42,083,008	$2,208,892

TABLE III (CONTD.)

WISCONSIN

STATE REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	TOTAL STATE AID	STATE CONTRIBUTION PER ENROLLED PUPIL
Green Bay	$ 3,725,013	$168
Kenosha	4,219,517	190
LaCrosse	1,170,547	118
Madison	3,998,160	120
Milwaukee	18,245,100	144
Racine	7,131,255	223
TOTAL TO ALL URBAN DISTRICTS	$ 38,489,592	$156
TOTAL ALL OTHER DISTRICTS (LEAs)	$184,743,790	$275
STATE TOTAL	$223,233,382***	$243

* This category include intermediate units (Cooperative Educational Service Agency).

** This category includes both state retirement and social security contributions.

*** This total does not include state aid to vocational education.

TABLE III (CONTD.)

WISCONSIN

STATE REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	GENERAL SUPPORT PROGRAM PER LOW INCOME PUPIL	SPECIAL EDUCATION & SOC-PSYCH SERVICES PER LOW INCOME PUPIL
Green Bay	$1,671	$334
Kenosha	2,141	286
LaCrosse	432	173
Madison	715	320
Milwaukee	469	160
Racine	2,576	251
TOTAL TO ALL URBAN DISTRICTS	$ 800	$197
TOTAL ALL OTHER DISTRICTS (LEAs)	$2,289	$132
STATE TOTAL	$1,838	$152

Sample-SFI

TABLE IV

WISCONSIN

LOCAL REVENUE CONTRIBUTIONS TO URBAN LEAs

DISTRICT (LEA)	TOTAL REVENUE FROM LOCAL TAX LEVY	REVENUE PER ENROLLED PUPIL
Green Bay	$14,879,889	$672
Kenosha	12,112,646	547
LaCrosse	4,879,089	491
Madison	24,830,577	744
Milwaukee	78,544,143	620
Racine	17,042,077	532
TOTAL ALL URBAN DISTRICTS (LEAs)	$152,288,421	$618
TOTAL ALL OTHER DISTRICTS	$338,808,292	$503
STATE TOTAL	$491,095,713	$534

Sample-LFI

TABLE V

WISCONSIN

FEDERAL, STATE, AND LOCAL REVENUE CONTRIBUTIONS TO
URBAN AND NON-URBAN LEAs AS A PERCENT OF TOTAL

DISTRICT (LEA)	FEDERAL		STATE		LOCAL		TOTAL	
	$	%	$	%	$	%	$	%
Green Bay	19	2.2	168	20.0	672	77.8	859	100.0
Kenosha	22	2.9	190	25.0	547	72.1	759	100.0
LaCrosse	26	4.1	118	18.6	491	77.3	635	100.0
Madison	28	3.1	120	13.5	744	83.4	892	100.0
Milwaukee	33	4.1	144	18.1	620	77.8	797	100.0
Racine	22	2.8	223	28.7	532	68.5	777	100.0
TOTAL TO ALL URBAN DISTRICTS	29	3.6	156	19.4	618	77.0	803	100.0
TOTAL ALL OTHER DISTRICTS (LEAs)	36	4.4	275	33.8	503	61.8	814	100.0
STATE TOTAL	32	4.0	243	30.0	534	66.0	809	100.0

Sample-FFI, SFI, LFI

Sample-PSQ

TABLE VI

WISCONSIN

SEA PROFESSIONAL MANPOWER ALLOCATION TO URBAN LEAs

Total Number of SEA Professionals	176
Total Number of SEA Professionals Responding with a Usable Professional Manpower Questionnaire	132
Percent Response	75.0%
Total Number of SEA Professionals Indicating Some Allocation of Time for Direct Services to Urban LEAs (PSQ #18)	69
Percent of SEA Professionals Allocating Time for Direct Services to Urban LEAs to Total SEA Professional Respondents	52.0%
Total Annual Salary of SEA Professionals Who Allocated Time for Direct Services to Urban LEAs (PSQ #7)	$953,994.00
Portion of Total Annual Salary of SEA Professionals Attributable to Direct Services for Urban LEAs	$188,890.00
Percent of Portion of Total Annual Salary of SEA Professionals Attributable to Direct Services for Urban LEAs to the Total Annual Salary of SEA Professionals	19.8%
Percent of Total Annual Salary of SEA Professionals Attributable to Direct Services for Urban LEAs from State Funds (PSQ #8)	65.0%
Projected Total Annual Salary of SEA Professionals Attributable to Direct Services for Urban LEAs*	$251,535.00

* The "Projected" total was computed by assuming a 100.0% response, 52.0% of SEA professionals allocating time for direct services to urban LEAs, and 19.8% of SEA professional annual salary attributable to direct services for urban LEAs.

TABLE VII

WISCONSIN

PROFESSIONAL EXPERIENCE OF SEA PROFESSIONALS PRIOR TO EMPLOYMENT:
BY YEAR OF EMPLOYMENT, PRIOR JOB DESCRIPTION,
AND LOCATION OF LAST POSITION*

YEAR EMPLOYED BY SEA	TOTAL	DESCRIPTION OF JOB PRIOR TO SEA EMPLOYMENT				LOCATION OF EMPLOYMENT PRIOR TO SEA	
		TEACHER	PRINCIPAL SUPERVISOR	SUPT. OR CEN. OFF.	OTHER	URBAN	NON-URBAN
1966-69	28	8	9	10	1	12	16
1961-65	13	1	5	5	2	5	8
1956-60	11	6	2	1	2	5	6
1951-55	6	2	-	3	1	2	4
1946-50	4	1	-	2	1	2	2
Before 1950	4	2	-	-	2	2	2
TOTAL	56**	20	16	21	9	28	38

* PSQ #9

** 3 Questionnaires Unusable

TABLE VIII

WISCONSIN

RECENCY OF DEGREE, FORMAL EDUCATION, AND TRAINING OF SEA PROFESSIONALS OFFERING DIRECT SERVICES TO URBAN LEAs*

YEARS	DEGREE		FORMAL EDUCATION		TRAINING	
	No.	%	No.	%	No.	%
1966-69	13	18.8	31	45.0	32	46.4
1961-65	11	15.9	13	18.8	5	7.2
1956-60	10	14.5	6	8.7	1	1.5
1951-55	10	14.5	5	7.2	-	0
1945-50	11	15.9	5	7.2	-	0
Before 1950	10	14.5	7	10.2	-	0
NONE	4	5.9	2	2.9	31	44.9
TOTAL	69	100.0	69	100.0	69	100.0

* PSQ #11, #12, and #13

TABLE IX

WISCONSIN

RANK ORDER OF SOURCES OF USEFUL INFORMATION
ABOUT URBAN SCHOOL DISTRICTS FOR SEA PROFESSIONALS*

SOURCE OF INFORMATION	RANK ORDER	WEIGHTED RANK ORDER**
Personal Experience and Observation	1	38
Conferences with LEA Personnel	3	134
LEA Reports to SEA	2	135
SEA Reports Relative to the LEAs	4	98
Newspaper Accounts of LEA Needs	5	83
Professional Journals and Periodicals	6	79
Federal Reports Relative to LEAs	7	46
SEA Training Programs	8	35
Reports Emanating from Other State Agencies	9	28
Television	10	22
Books, Popular Magazines	11	15
University Educational and Training Programs	12	7

* PSQ #14

** The Weighted Rank Order was determined by weighting the 1-5 nominations 5,4, 3,2 and 1 respectively. All the weighted nominations were then added to arrive at the Weighted Rank Order.

TABLE X

WISCONSIN

MOST FREQUENTLY USED MEANS OF COMMUNICATION
WITH URBAN SCHOOL DISTRICTS BY SEA PROFESSIONALS*

MEANS OF COMMUNICATION**	RANK ORDER	WEIGHTED RANK ORDER
Telephone	1	179
Face-to-Face with an Individual at an LEA	2	112
Face-to-Face with a Group at an LEA	3	77
Written Correspondence	4	57
Face-to-Face with an Individual at the SEA	5	45
Face-to-Face with a Group at the SEA	6	36

* PSQ #21

** The revised PSQ which is contained in these materials has provided for a response entitled, "Professional Meetings, Conventions, and Conferences" which is not here.

TABLE XI

WISCONSIN

SOURCE OF INITIATION OF ACTION REGARDING PROGRAMS, SERVICES, ETC. ADMINISTERED BY SEA PROFESSIONALS*

SOURCE OF INITIATION	RANK ORDER	WEIGHTED RANK ORDER
Local School District (LEA)	1	266
State Education Agency**	2	154
Other State Agencies	3	82
Federal Government	4	80
Other Organized Association or Interest Group	5	77
Citizen(s)	6	77
Organized Professional Education Association or Interest Group	7	61

* PSQ #17

** The revised PSQ which is contained in these materials has sub-categorized State Education Agency into three components: "From a Superior," "Self-Initiated," and "Standard Operating Procedure/Established Policy."

TABLE XII

WISCONSIN

TYPES OF ACTIVITIES PERFORMED BY SEA PROFESSIONALS
OFFERING DIRECT SERVICES TO URBAN LEA*

TYPES OF ACTIVITIES	PERCENT OF TIME DEVOTED TO ACTIVITY WITH URBAN LEA**
Review, Evaluation, and Revision	23.5
Consultation	19.4
Report Writing and Data Gathering	18.6
General, Miscellaneous Administrative Tasks	13.7
Enforcement	8.9
Development and Dissemination	6.8
Travel	4.1
Supervision	2.5
Inter-Agency, Office Coordination	2.3
Fiscal Management	.2
TOTAL	100.0

* PSQ #19

** This data has absolutely no basis in Wisconsin or in fact. This form of analysis was suggested during the course of the development and piloting of the PSQ. The information contained in this table is therefore for illustrative purposes only.